

Feasibility or Case Study for gas supply expansion for Mazowieckie, POLAND

Del. 4.3.13



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| Work Package | WP 4: Supply and distribution infrastructure for gas fuels |
| Country | POLAND |
| Region | mazowieckie |
| Are there existing filling stations and natural gas and biogas driven cars already in the region? | YES |
| Status (F:Final, D:Draft) | F – 8 th June 2009 |

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This case study will look at the successful installation of at least one new gas filling station and one new biogas plant (where appropriate) in your area, and analyse the reasons why this has been successfully installed. Please copy this whole form for each Feasibility Study you undertake

A. Gas filling station

A1. Case Study or Feasibility Study

A1.1. How many feasibility studies or case studies have you undertaken for new gas filling stations from 1 Sep 2007 to 20 Aug 2009

| | |
|--------------------------------|---|
| Number of case studies: | 1 |
| Number of feasibility studies: | - |

A1.2 This is Case Study number 1 Reporting date November 2009

A1.3 This is Feasibility Study number - Reporting date November 2009

A1.4 Title of this Case Study/Feasibility Study: New Gas Filling Station in Prądyńskiego St., Warsaw

A1.5 How was the Case study/Feasibility study selected. According to what criteria?

This study had been performed in order to present feasibility of gas filling station. Lack of private gas filling stations (already 2 in region) is main barrier of NGV market expansion. Case study has been made for Polskie Górnictwo Naftowe i Gazownictwo (PGNiG) which is the largest Polish oil and gas exploration and production company. PGNiG is a leader in natural gas segments in Poland that are trade, distribution, oil and gas exploration and production as well as gas storage and processing. The company is also the largest importer of natural gas to Poland.

A1.6 Would this Case Study/Feasibility Study have taken place without the input from MADEGASCAR

Yes or No No

Please give details: (Was it planned before, was it started before, was it initiated by MADEGASCAR, etc)

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| Gas filling station had been planned from few years, however input of MAGEGASCAR accelerated decision of construction. |
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A1.7 Did you carry out the Study for a particular company or as a marketing tool?

IEO carried it out for particular company - PGNiG

A2. The Study

A2.2 List partners in your study

For whom did you carry out the Study
 Company name: Polskie Górnictwo Naftowe i Gazownictwo - PGNiG)
 Public/private: public
 Business/role: state-owned company which produce, deliver and sell natural gas
 Address: M. Kasprzaka 25, 01-225 Warszawa
 Contact person: Robert Pastwa
 Tel: (0048) 601 770 089
 Fax : + 48 22 691 82 73
 E-mail: Robert.Pastwa@pgnig.pl
 Website: <http://www.pgnig.pl/>

Gas supplier
 Company name: Polskie Górnictwo Naftowe i Gazownictwo - PGNiG)
 Public/private: public
 Address: M. Kasprzaka 25, 01-225 Warszawa
 Contact person: Robert Pastwa
 Tel: (0048) 601 770 089
 Fax : + 48 22 691 82 73
 E-mail: Robert.Pastwa@pgnig.pl
 Website: <http://www.pgnig.pl/>

Filling station construction company
 Company name Górnśląski Zakład Obsługi Gazownictwa
 Public/private: private
 Address: Pyskowicka 25, 41-807 Zabrze
 Contact person:
 Tel: 032 376 19 99
 Fax: 032 376 22 70
 E-mail: sekretariat@gzog.pl
 Website: <http://www.gzog.pl/>

Owner of new filling station
 Company name: Polskie Górnictwo Naftowe i Gazownictwo - PGNiG)
 Public/private: public
 Address: M. Kasprzaka 25, 01-225 Warszawa
 Contact person: Robert Pastwa
 Tel: (0048) 601 770 089
 Fax : + 48 22 691 82 73
 E-mail: Robert.Pastwa@pgnig.pl
 Website: <http://www.pgnig.pl/>

Principal users of new filling station
 Company name: Wawa Taxi – regional taxi company
 Public/private: private
 Address: Mińska 69 Street, 03-828, Warsaw
 Contact person: Bogumił Bedyński

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| Tel: | (0048) 22 870 50 00 |
| Fax: | (+48 22) 870 2000 |
| E-mail: | bogumil@wawa9644.pl |
| Website: | http://www.wawataxi.pl |

| | |
|---|--|
| Principal users of new filling station | |
| Company name: Mazowiecka Spółka Gazownictwa (subsidiary of PGNiG) – company which use station for filling own car fleet | |
| Public/private: | public |
| Address: | M. Kasprzaka 25, 01-225 Warszawa |
| Contact person: | Robert Pastwa |
| Tel: | (0048) 601 770 089 |
| Fax : | + 48 22 691 82 73 |
| E-mail: | Robert.Pastwa@pgnig.pl |
| Website: | http://www.pgnig.pl/ |

A2.3 Describe new/proposed filling station:

| Gas filling station | |
|---|--|
| Name of filling station and address | PGNiG gas filling station, Prądzyńskiego 16 Street, Warszawa |
| Type of location, eg. urban, motorway, industrial estate, | Urban |
| Type of filling station eg stand-alone, within petrol/diesel filling station | Stand alone |
| Number of fast filling points | 6 |
| Number of slow filling points | 0 |
| Number and make of compressors | 2 * 600 m ³ Galileo, model Microbox |
| Storage pressure (bar) | 250 bar |
| Storage capacity (water litres) | 3600 water litres |
| Ownership of station | Polskie Górnictwo Naftowe i Gazownictwo (PGNiG) |
| Method of financing station | Equity of owner |
| Main user of stadion (planned) | Wawa Taxi, PGNiG |
| Number of vehicle fills per week (planned) | 700 cars refuel containers |
| Total weekly supply of gas to vehicles (planned) | 12 500 m ³ |
| Types of vehicles already using the filling station eg HGV, bus, van, taxi, car (planned) | Bus, van, taxi, personal cars |
| What proportion of the gas is biomethane | 0 % |
| Name of gas supplier | PGNiG |
| Price of gas to vehicle owner | € 2,10 per m ³ |
| Price of gas to station owner | € 2,10 per m ³ |
| Opening hours | 24/7 |

| | |
|--|--|
| Method of payment, eg. credit card, special card, number plate recognition and account (planned) | Bill of sale, cash |
| Profitable or not, with figures if possible | According to PGNiG representative no profitable, no figures. |

A2.4 What was MADEGASCAR's major contribution to the Study

IEO used data from Polish and European partners of MADEGASCAR for the study

A2.5 Were there any incentives to help establish the new filling station?

No financial incentives. Station is financed from PGNiG equity

A2.6 Barriers to establishing new gas filling station:

Expensive technology; no profitable for so small scale; lack of information in general public, distrust of general public, access road to the station in construction is narrow therefore, building machines and trucks block road for other users of the road.

A2.7 How did MADEGASCAR help to overcome these barriers

We had sent informational and promotional materials to the partners and promote gas filling station to general public.

A2.8 How did others help to overcome these barriers

Wawa Taxi stated that drivers have to refuel taxi cabs before 10 PM (existing station operates only from 6AM to 10PM). Górnośląski Zakład Obsługi Gazownictwa delivered reliable technology of gas filling station (Galileo)

A2.9 Was a new gas filling station built as a result of your Study

no

A2.10 Total capital cost of new filling station

Around 6 mio
PLN

A2.11 How long did it take to execute the Case Study/Feasibility Study

100 hours

A2.12 What is the current status (e.g. finished, work in progress)

finished

A2.13 When did the Case Study/Feasibility Study start

May 2009

A2.14 When did/will the Case Study/Feasibility Study end

It has been finished

A2.15 How long did you spend working on this Case Study/Feasibility Study

100 hours

A2.16 How did this Case Study/Feasibility Study cost

free

A2.17 General conclusions and recommendations

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A2.18 Comments

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